



GUAM VISITORS BUREAU
Japan Visitor Tracker Exit Profile
FY2011 MARKET SEGMENTATION –
NOVEMBER 2010



Prepared by: QMark Research

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Background & Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **329** departing Japanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **329** is +/- 5.4 percentage points with a 95% confidence level. That is, if all Japanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.4 percentage points.

Objectives

- **The specific objectives of the analysis were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - Divers
 - Families
 - Golfers
 - Group Travelers
 - OL's/ salary women
 - Seniors
 - Shoppers
 - Repeat Visitors
 - Students
 - Visitors coming to Guam for a wedding
 - Honeymooners
 - To identify (for all Japanese visitors) the most important determinants of on-island spending; and
 - To identify the most significant factors affecting overall visitor satisfaction.

Highlighted Segments

Parameters

- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

Highlighted Segments

	Oct 10	Nov 10	Dec 10	Jan 11	Feb 11	Mar 11	Apr 11	May 11	Jun 11	July 11	Aug 11	Sept 11
Families	23%	19%										
Repeaters	38%	39%										
Shoppers	58%	62%										
Seniors	9%	8%										
OL/Salary-woman	18%	14%										
Group Travelers	6%	3%										
Students	13%	13%										
Golfers	4%	4%										
Wedding	6%	5%										
Divers	9%	10%										
Honey-mooner	5%	5%										
TOTAL	329	329										

SECTION 1 **PROFILE OF RESPONDENTS**

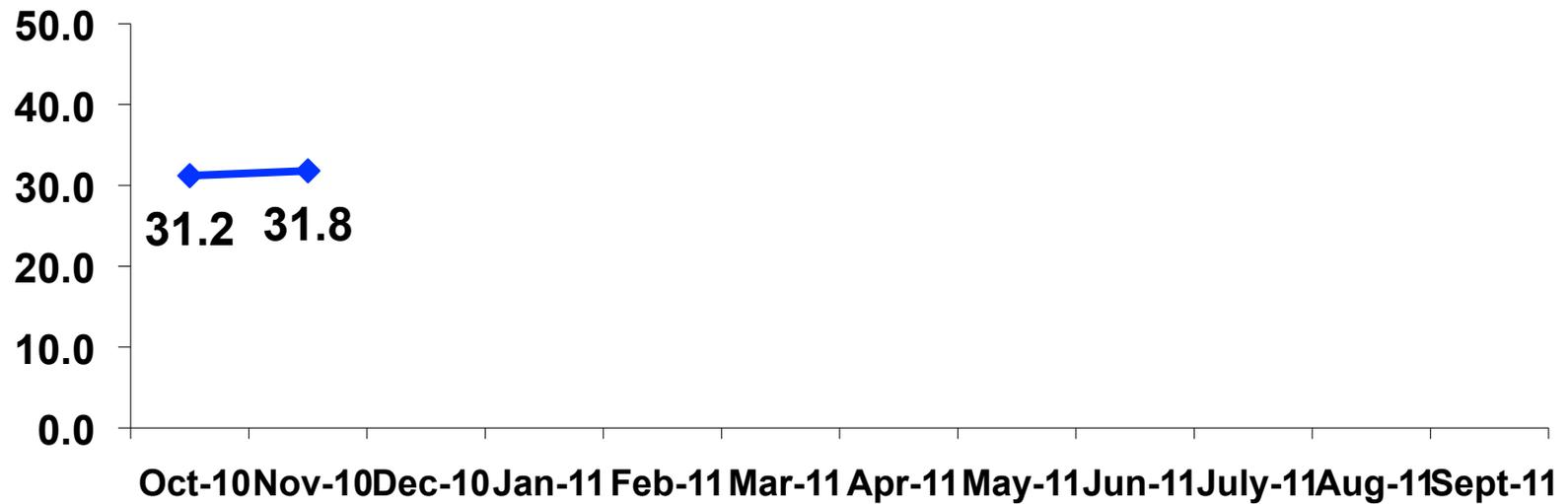
Marital Status Tracking



Marital Status Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
C. Married	Count		146	46	67	91	9	2	1	9	12	16	15	25
	Col %		44%	74%	52%	45%	19%	22%	2%	64%	71%	89%	44%	93%
Single	Count		183	16	62	113	38	7	40	5	5	2	19	2
	Col %		56%	26%	48%	55%	81%	78%	98%	36%	29%	11%	56%	7%
Total	Count		329	62	129	204	47	9	41	14	17	18	34	27

Average Age Tracking



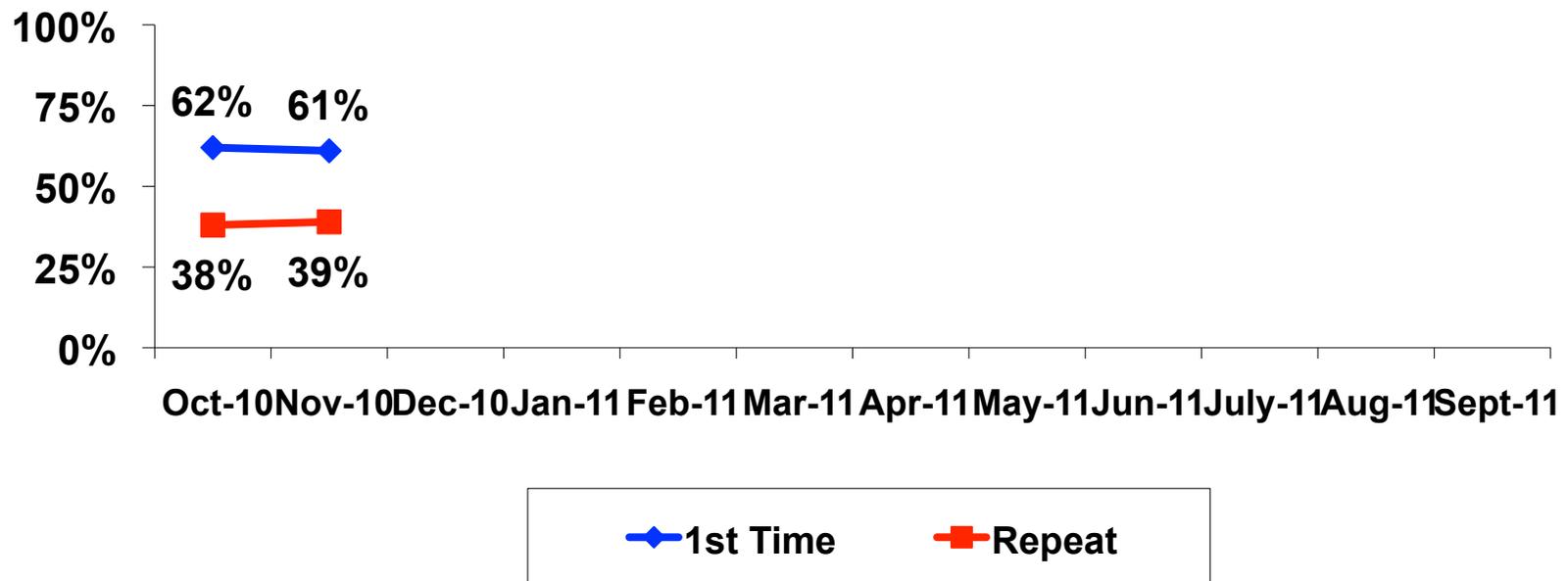
Age Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	224	23	65	139	37	8	41	9	10	16	22	
		Col %	68%	37%	51%	68%	79%	89%	100%	69%	59%	89%	65%	
	35-54	Count	91	35	54	56	10	1		3	5	2	9	14
		Col %	28%	56%	42%	27%	21%	11%		23%	29%	11%	26%	52%
	55+	Count	13	4	9	9				1	2		3	13
		Col %	4%	6%	7%	4%				8%	12%		9%	48%
Total	Count		328	62	128	204	47	9	41	13	17	18	34	27
D.	Mean		31.8	37.8	35.4	31.8	29.4	26.9	21.7	33.2	36.8	28.4	31.4	57.0
	Median		29	38	34	28	27	24	21	31	33	28	26	54

Income Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.31	Less than Y2	Count	16	1	4	14	2		3			1		1
	million	Col %	6%	2%	3%	8%	5%		11%			6%		4%
	Y2,000,001 -	Count	34	5	10	25	9	1	2	1	1	2	4	1
	Y3,000,000	Col %	12%	9%	9%	14%	23%	14%	7%	8%	6%	13%	15%	4%
	Y3,000,001 -	Count	44	5	18	25	13	2	3	1	2	1	3	4
	Y4,000,000	Col %	15%	9%	16%	14%	33%	29%	11%	8%	13%	6%	11%	15%
	Y4,000,001 -	Count	48	3	13	22	5	2	4	3	2	6	1	1
	Y5,000,000	Col %	17%	5%	11%	12%	13%	29%	14%	23%	13%	38%	4%	4%
	Y5,000,00 -	Count	68	16	29	50	4		8	7	2	4	12	9
	Y7,000,000	Col %	24%	29%	25%	28%	10%		29%	54%	13%	25%	44%	35%
	Y7,000,001 -	Count	39	16	22	23	3	1	1		7	2	3	8
	Y10,000,000	Col %	14%	29%	19%	13%	8%	14%	4%		44%	13%	11%	31%
	Y10,000,001	Count	31	7	17	20	4	1	6	1	2		3	2
	or more	Col %	11%	13%	15%	11%	10%	14%	21%	8%	13%		11%	8%
	No Income	Count	5	2	2	1			1				1	
		Col %	2%	4%	2%	1%			4%				4%	
Total	Count		285	55	115	180	40	7	28	13	16	16	27	26

Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A Yes	Count		198	30		126	29	8	33	7	15	14	23	11
	Col %		61%	48%		62%	63%	39%	80%	54%	88%	78%	68%	41%
No	Count		129	32	129	76	17	1	8	6	2	4	11	16
	Col %		39%	52%	100%	38%	37%	11%	20%	46%	12%	22%	32%	59%
Total	Count		327	62	129	202	46	9	41	13	17	18	34	27

Average Length of Stay Tracking



Average Length of Stay Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q 8 Mean	3.0	3.1	3.0	3.0	2.7	3.0	3.1	3.1	3.2	3.6	3.1	3.3
Median	3	3	3	3	3	2	3	3	3	4	3	3
Minimum	1	1	1	1	1	1	1	2	2	2	2	2
Maximum	7	6	7	7	4	6	5	5	5	5	6	7

SECTION 2 **TRAVEL PLANNING**

Travel Planning Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.7 Full package tours	Count		53	17	18	30	7		8	1	6	7	5	5
	Col %		17%	27%	14%	15%	15%		20%	7%	35%	39%	15%	19%
Free-time package tours	Count		236	39	93	150	36		32	12	11	10	27	18
	Col %		74%	63%	73%	76%	77%		80%	86%	65%	56%	79%	57%
Individually arranged travel	Count		20	5	15	11	3			1		1	1	4
	Col %		6%	8%	12%	6%	6%			7%		6%	3%	15%
Group tour	Count		9	1	1	6	1	9					1	
	Col %		3%	2%	1%	3%	2%	100%					3%	
Other	Count		1			1								
	Col %		0%			1%								
Total	Count		319	62	127	198	47	9	40	14	17	18	34	27

Travel Motivation Segmentation

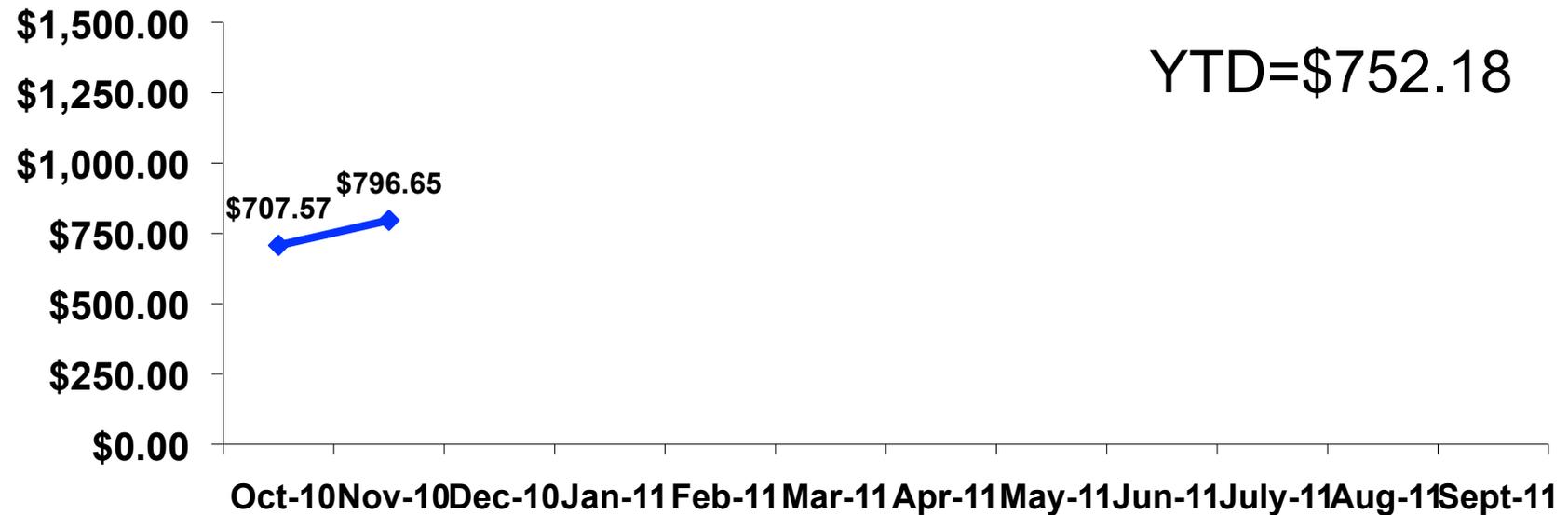
	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5 Beautiful seas, beaches, tropical climate	47%	53%	50%	49%	47%	33%	54%	57%	18%	39%	41%	37%
Pleasure	45%	47%	47%	46%	38%	44%	63%	50%	12%	33%	56%	44%
Short travel time	37%	40%	41%	40%	30%	22%	44%	29%	12%	39%	53%	41%
Shopping	37%	39%	42%	41%	49%	22%	41%	14%	12%	28%	41%	30%
Price of the tour package	34%	35%	40%	36%	19%	33%	37%	43%	12%	28%	29%	26%
A previous visit	29%	40%	73%	28%	26%		12%	36%	6%	6%	18%	48%
Just to relax	30%	35%	34%	32%	30%	22%	12%	57%	12%	28%	29%	33%
It is a safe place to spend a vacation	23%	27%	24%	19%	15%	11%	12%	29%	12%	22%	32%	30%
Water sports	17%	21%	18%	19%	19%	44%	15%	14%	6%	6%	29%	4%
Recommendation of friend, relative, travel agency	17%	10%	10%	20%	23%		39%	21%		22%	29%	15%
SCUBA diving	6%	3%	8%	6%	4%		7%	7%		6%	47%	7%
To get married or Attend wedding	5%	16%	2%	4%	2%		2%		100%	17%		11%
Honeymoon	5%	2%	3%	5%				14%	18%	100%	9%	
Other	3%	3%	3%	3%		11%	7%	7%		6%		4%
To golf	3%		4%	3%	2%			29%				7%
Company or Business trip	3%	2%	1%	3%	4%	44%		7%				
Organized Sporting Activity	2%	2%	3%	2%	4%							7%
Career certification or testing	2%	2%	3%	1%	2%							
To visit friends or relatives	1%		1%	1%				7%				
My company sponsored me	1%		1%	1%								
Convention, Conference, Trade show	0%		1%	0%								
Promotional materials from GVB	0%		1%									4%
Total Cases	328	62	129	203	47	9	41	14	17	18	34	27

Information Sources Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1												
Travel guide book at bookstores	65%	77%	60%	66%	55%	56%	73%	64%	76%	61%	82%	70%
Internet	64%	69%	72%	64%	66%	78%	66%	71%	53%	44%	65%	63%
I have been to Guam before	37%	50%	95%	35%	36%	11%	17%	36%	12%	11%	32%	59%
Travel agent brochure	38%	32%	33%	39%	30%	44%	66%	43%	41%	61%	44%	44%
Friend or relative	19%	18%	9%	22%	17%		44%	43%	18%	17%	24%	11%
Magazine	18%	16%	19%	18%	17%	22%	24%		18%	17%	21%	22%
TV	9%	8%	8%	11%	11%	11%	17%	7%			18%	15%
Company travel department	5%	6%	4%	7%	4%	22%	2%	7%	6%		6%	
Newspaper	3%	5%	5%	2%			2%					19%
GVB promotional activities	2%	5%	1%	2%	2%						6%	4%
GVB office	1%		2%	1%	2%							4%
Other	1%			1%								
Total	329	62	129	204	47	9	41	14	17	18	34	27

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid	Mean	\$796.65	\$786.27	\$783.07	\$778.10	\$769.56	\$447.87	\$635.57	\$1,099.11	\$1,235.20	\$1,463.32	\$934.39	\$751.89
per	Median	\$674	\$660	\$613	\$636	\$735	\$460	\$588	\$1,103	\$1,103	\$1,226	\$644	\$674
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
converted to \$	Maximum	\$4,903.16	\$2,723.98	\$4,903.16	\$4,903.16	\$1,634.39	\$1,634.39	\$1,348.37	\$2,451.58	\$2,723.98	\$4,903.16	\$4,903.16	\$1,833.69

On-Island Expenditures Tracking



On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$640.28	\$427.13	\$675.71	\$663.22	\$770.28	\$520.30	\$460.00	\$823.24	\$297.35	\$699.89	\$732.86	\$454.61
	Median	\$500	\$325	\$500	\$500	\$600	\$500	\$350	\$595	\$250	\$500	\$550	\$400
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20.00	\$0.00	\$0.00	\$0.00	\$0.00
	Maximum	\$3,500.00	\$2,250.00	\$3,500.00	\$3,500.00	\$2,605.00	\$1,046.00	\$2,100.00	\$2,500.00	\$1,425.00	\$2,500.00	\$2,500.00	\$2,100.00

On-Island Expense Breakdown Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$22.75	\$35.50	\$29.89	\$27.13	\$10.74	\$33.44	\$10.51	\$29.86	\$7.65	\$42.11	\$27.32	\$72.96
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
F&B-FF REST/CONV	Mean	\$30.47	\$41.79	\$35.93	\$30.84	\$24.70	\$23.89	\$17.95	\$40.36	\$10.59	\$50.28	\$31.26	\$32.33
	Median	\$7.00	\$3.50	\$10.00	\$15.00	\$7.00	\$6.00	\$10.00	\$2.50	\$0.00	\$10.00	\$20.00	\$0.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$66.95	\$91.08	\$85.67	\$73.29	\$48.53	\$19.00	\$44.10	\$36.36	\$96.47	\$116.67	\$63.06	\$57.81
	Median	\$0.00	\$12.00	\$40.00	\$33.50	\$0.00	\$0.00	\$13.00	\$0.00	\$0.00	\$25.00	\$35.00	\$0.00
OPTIONAL TOUR	Mean	\$78.79	\$114.94	\$92.20	\$78.07	\$61.91	\$47.67	\$56.63	\$75.00	\$89.76	\$119.44	\$158.88	\$83.74
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$50.00	\$15.00	\$10.00	\$0.00	\$0.00	\$100.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$305.30	\$441.37	\$443.60	\$322.00	\$262.77	\$157.22	\$119.46	\$317.86	\$198.82	\$141.67	\$247.50	\$75.56
	Median	\$50.00	\$100.00	\$100.00	\$100.00	\$80.00	\$200.00	\$30.00	\$200.00	\$0.00	\$0.00	\$50.00	\$0.00
GIFT/ SOUV- F&F AT HOME	Mean	\$123.39	\$128.68	\$138.42	\$135.32	\$161.17	\$187.78	\$91.88	\$197.64	\$83.18	\$110.56	\$84.00	\$87.11
	Median	\$50.00	\$55.50	\$50.00	\$56.50	\$70.00	\$100.00	\$40.00	\$20.00	\$50.00	\$25.00	\$50.50	\$50.00
LOCAL TRANS	Mean	\$11.68	\$17.66	\$16.78	\$12.72	\$5.87	\$2.22	\$8.90	\$10.36	\$3.53	\$11.72	\$11.21	\$5.30
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OTHER EXP	Mean	\$313.73	\$301.77	\$261.88	\$268.64	\$271.70	\$108.33	\$131.41	\$560.14	\$94.71	\$890.67	\$492.09	\$473.70
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25.00	\$0.00	\$70.00	\$51.00	\$0.00

Total Expenditures Tracking



Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Total per person expense	Mean	\$1,436.93	\$1,213.40	\$1,458.78	\$1,441.32	\$1,539.83	\$968.16	\$1,095.57	\$1,922.35	\$1,532.56	\$2,163.21	\$1,667.24	\$1,206.51
	Median	\$1,258.05	\$1,148.38	\$1,235.47	\$1,261.61	\$1,390.32	\$959.67	\$1,035.47	\$1,898.21	\$1,346.76	\$1,714.50	\$1,222.14	\$1,140.32
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00	\$0.00	\$0.00	\$487.86	\$0.00
	Maximum	\$6,903.16	\$3,782.24	\$6,903.16	\$6,903.16	\$3,679.01	\$1,901.05	\$2,780.63	\$3,725.79	\$3,876.58	\$6,903.16	\$6,903.16	\$3,815.11

SECTION 4
ADVANCED STATISTICS

Analysis Technique

- Dependent variables: total per person on island expenditure and overall satisfaction (numeric)
- Independent variables are satisfaction with different aspects of trip to Guam (numeric).
- Use of linear stepwise regression to derive predictors (drivers) of on-island expenditure and overall satisfaction, Since both the independent and dependent variables are numeric.
- This determines the significant ($p < .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

Comparison of Drivers of Overall Satisfaction, Oct., Nov 2010, and Overall Oct - Nov 2010			
	Oct-10	Nov-10	Combined Oct - Nov 2010
Independent Variables:	rank	rank	rank
Cleanliness of beaches & parks	2		2
Ease of getting around			
Safety walking around at night		3	
Quality of daytime tours			
Variety of daytime tours			
Quality of nighttime tours			
Variety of nighttime tours			
Quality of shopping		2	
Variety of shopping	3		3
Price of things on Guam	1		1
Quality of hotel accommodations		1	4
% of Overall Satisfaction Accounted For	36.7%	36.0%	37.3%
NOTE: Only significant variables are ranked.			

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by three significant factors in the November 2010 Period. By rank order they are:
 - **Quality of hotel accommodations,**
 - **Quality of shopping, and**
 - **Safety walking around at night.**
- With all three factors the overall r^2 is .36 meaning that **36% of overall satisfaction is accounted for by these three factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct., Nov 2010, and Overall Oct-Nov 2010			
	Oct-10	Nov-10	Combined Oct - Nov 2010
Independent Variables:	rank	rank	rank
Cleanliness of beaches & parks			
Ease of getting around			
Safety walking around at night			
Quality of daytime tours			
Variety of daytime tours			
Quality of nighttime tours			
Variety of nighttime tours			
Quality of shopping	1		
Variety of shopping			
Price of things on Guam			
Quality of hotel accommodations			
% of Overall Satisfaction Accounted For	4.0%	0.0%	0.0%
NOTE: Only significant variables are ranked.			

Drivers of Per Person On Island Expenditure

- There are no significant drivers of Per Person On Island Expenditure in the November 2010 period.